

## **DOCUMENTS TO KEEP ON FILE**

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### **Program Specific Deliverables for Third Party Programs**

**Direct Installation Programs** (Programs where Implementer provides energy efficiency measures, including maintenance, repair, or optimization services at no charge to the Customer)

Implementer shall keep on file the following documents for a period of not less than three years after end of contract:

- Customer signed site access agreements

**Rebate, Loan, or other Financial Assistance Programs** (Programs where Implementer provides rebate, loan, co-funding, or other financial assistance for the installation of energy efficiency measures, including maintenance, repair, or optimization services)

Implementer shall keep on file the following documents for a period of not less than three years after end of contract:

- Application forms
- Customer Notification Letters (notifying Customers if their applications have been approved or rejected)

### **All Programs**

Implementer shall keep on file for a period of not less than three years after end of contract:

- all reports and supporting documentation submitted to the CPUC and/or IOU Contract Administrator on a monthly and quarterly basis.
- all forms and other documentation filled out by implementer or customers pertaining to agreements made and measures or services provided (e.g. Measure Installation Forms for AC Diagnostic, Duct Testing and Sealing; Signed Safety Test Information Sheets and Forms)